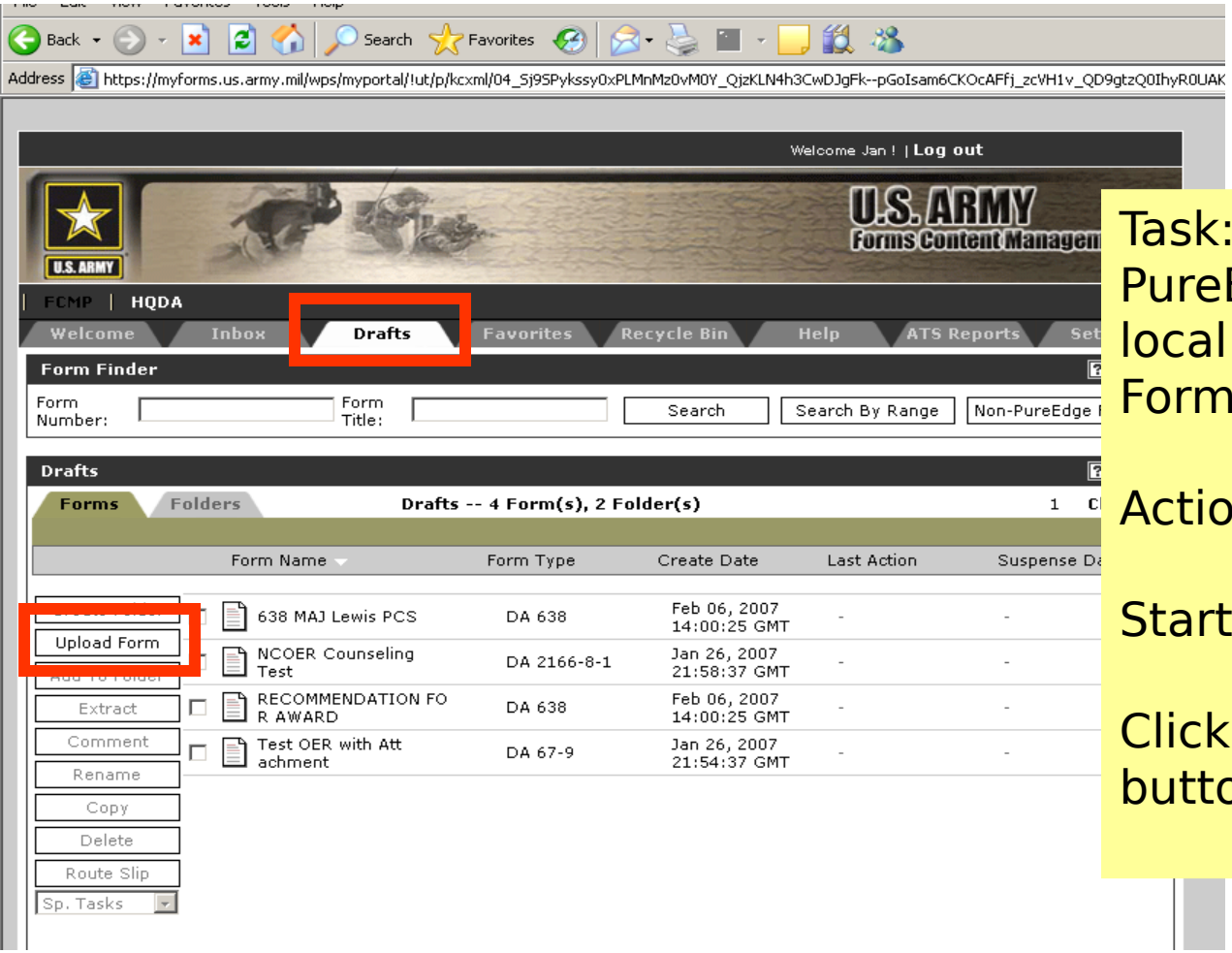
Specific Training

Section D: Uploading Forms into the AKO My Forms portal

(NOTE: This task is different from that used for HRC-Indianapolis (formerly EREC) NCOER upload system)

POC: ESO, tapcmse@conus.army.mil, (703) 325-9660 (DSN: 221) https://www.hrc.army.mil/site/Active/TAGD/ESPD(formerly_MSD)/msdweb.h
As of: 7 Apr 08

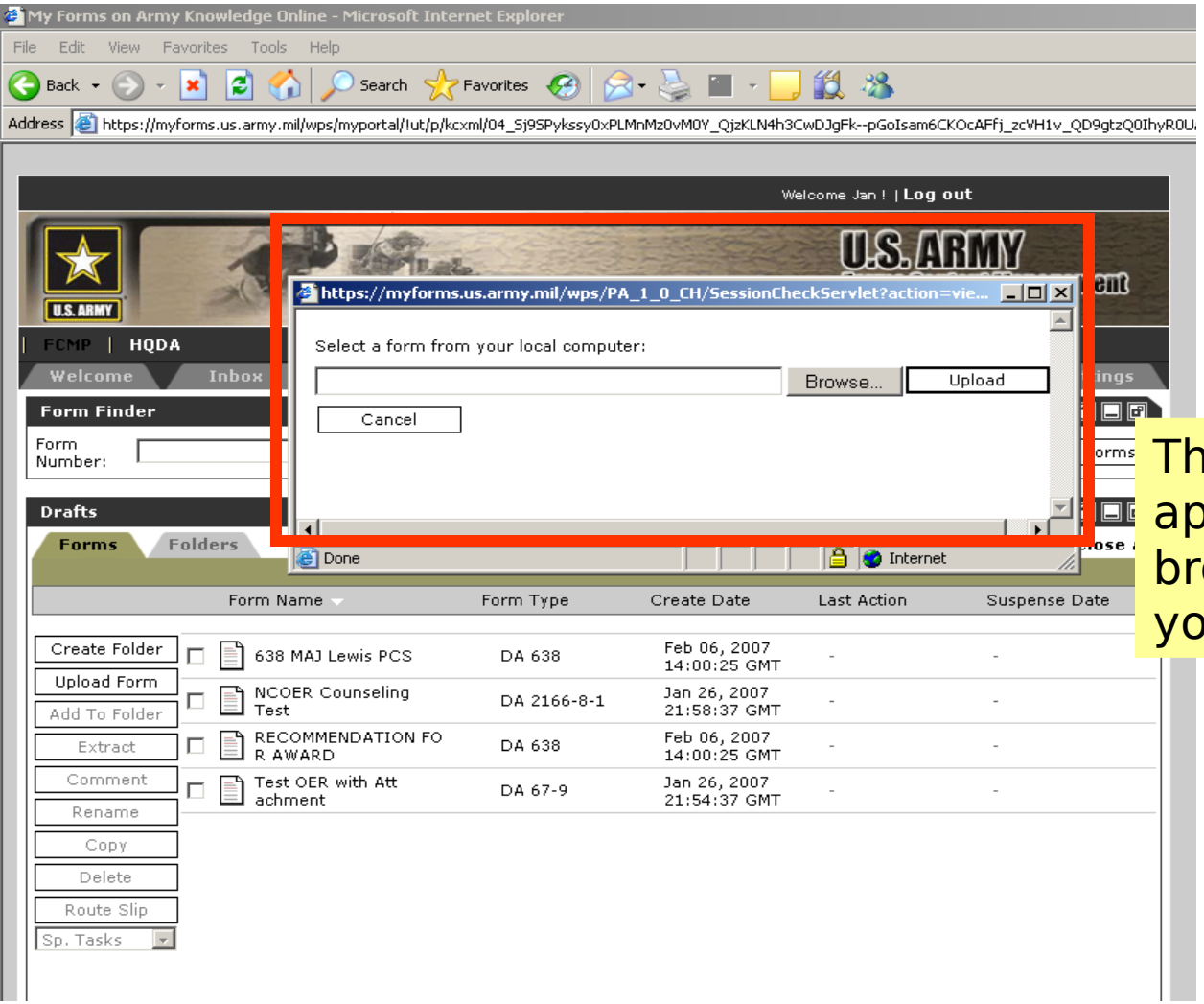


Task: Upload any PureEdge form from a local drive to the My Forms Portal

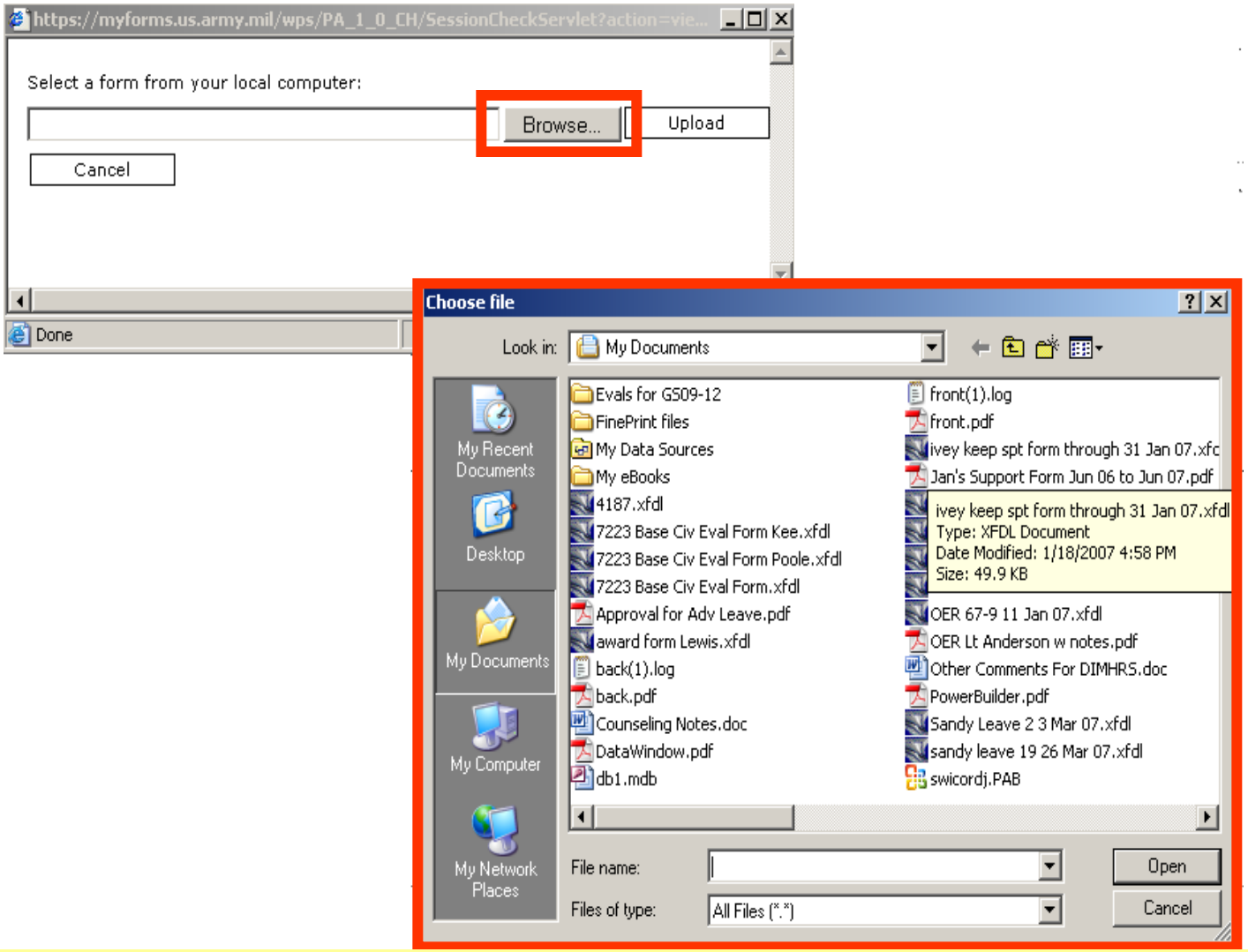
Actions:

Start in the Drafts tab

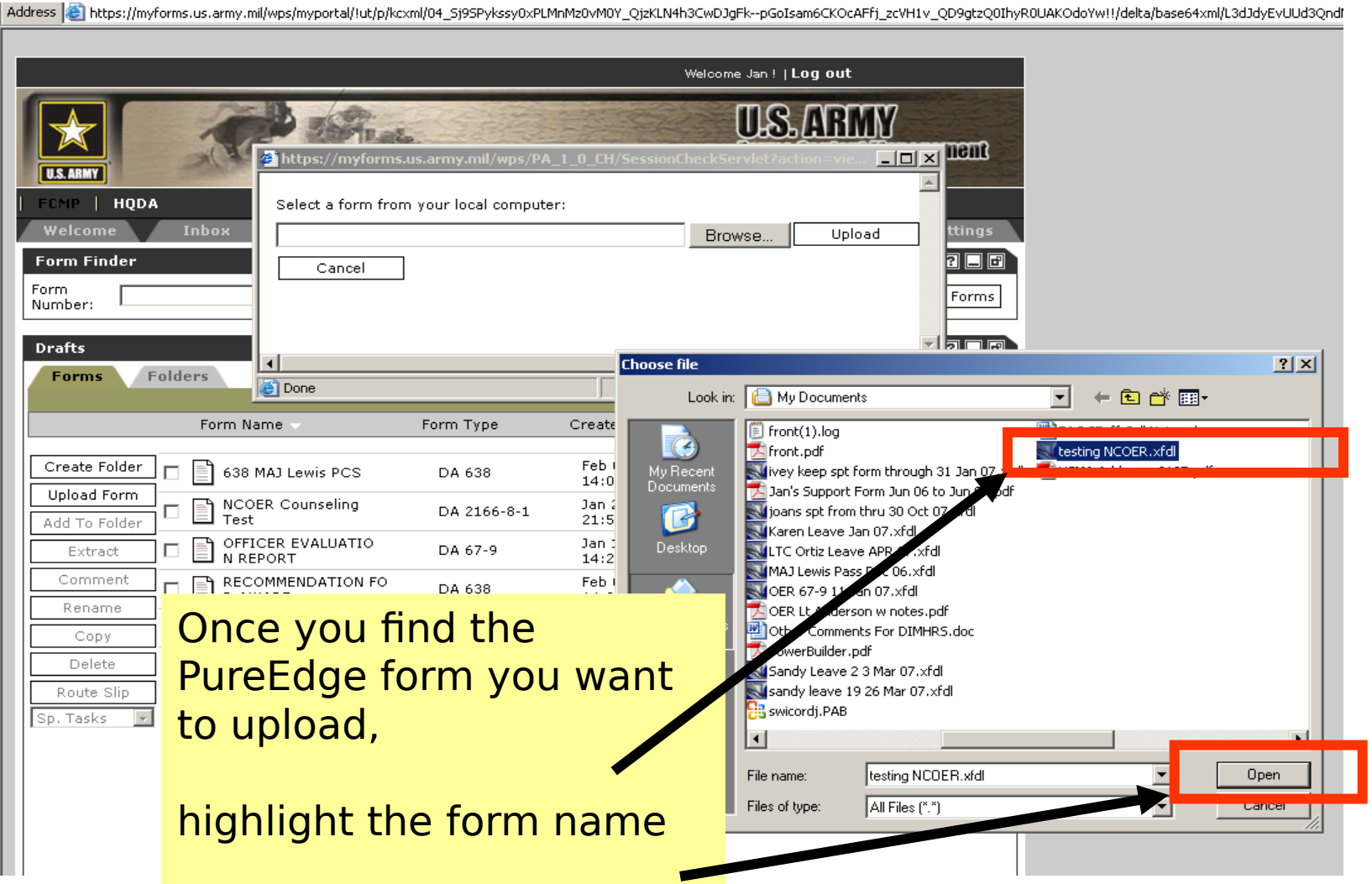
Click on Upload Form button



This dialogue box will appear. It allows you to browse to the actual form you want to upload.



Click on the browse button in the first dialogue box. It opens up a second dialogue box to your computer and allows you to sort through documents and find the actual PureEdge form you want to upload.

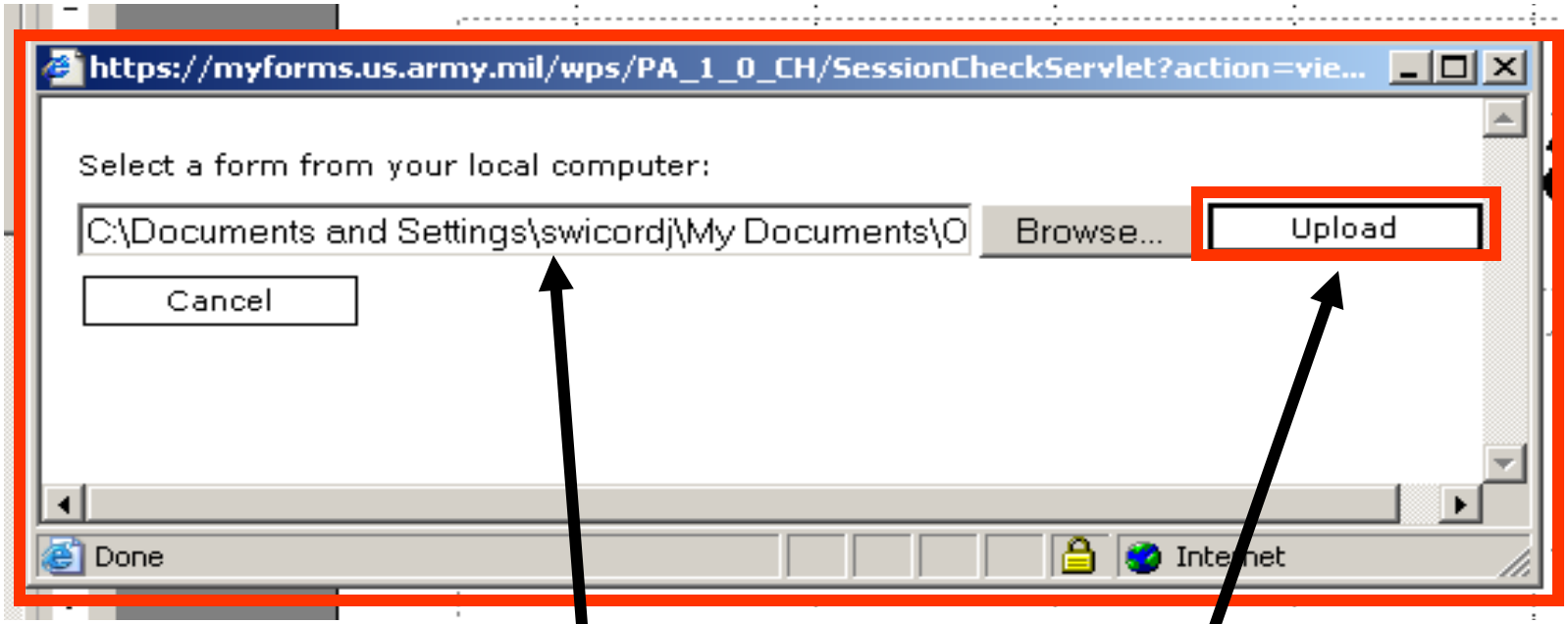


Once you find the PureEdge form you want to upload,

highlight the form name

and select the OPEN button.

NOTE: You can only upload .XFDL forms



The original dialogue box will now show the location and form you have selected to upload.

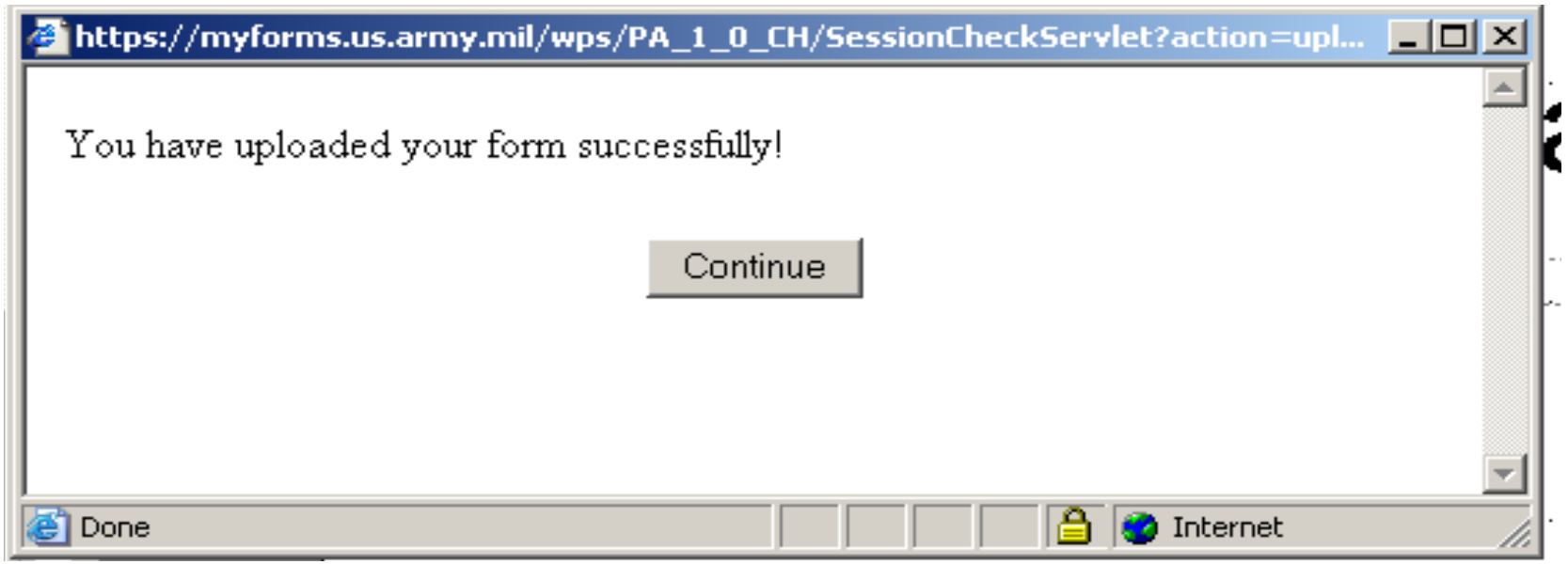
Select the UPLOAD button.

<u>Option 1</u>: **Alert: *"You have uploaded your form successfully!"***

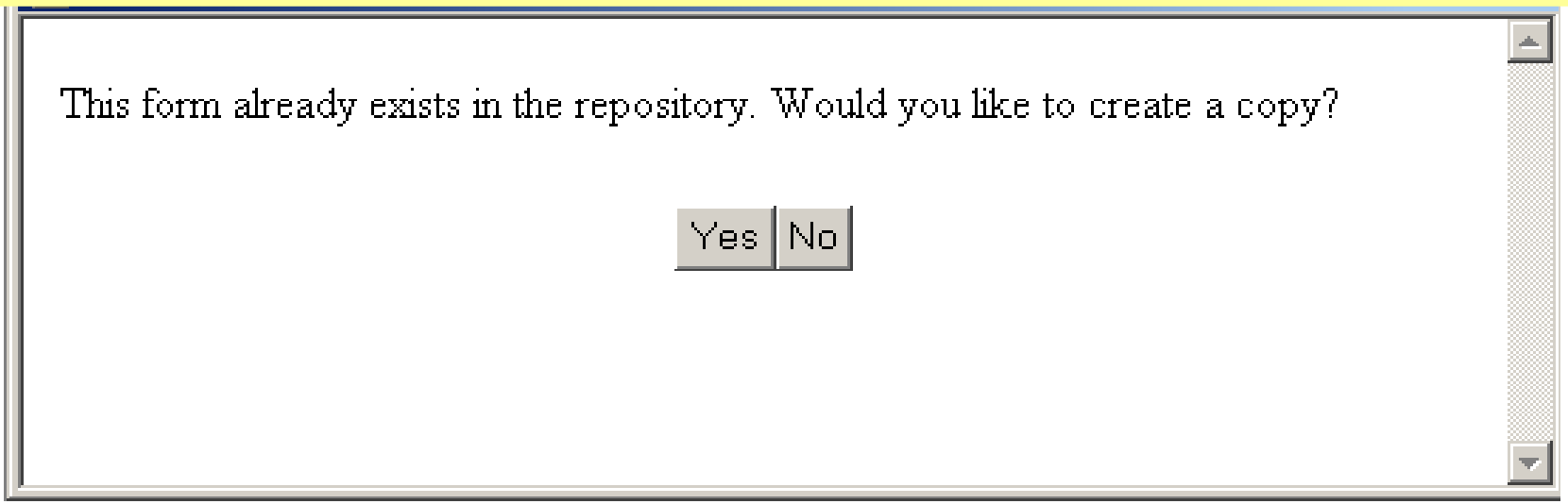
You would get this alert if you are uploading **a form that has never been in My Forms before**.

If the alert tells you it has NOT uploaded successfully, then try again.

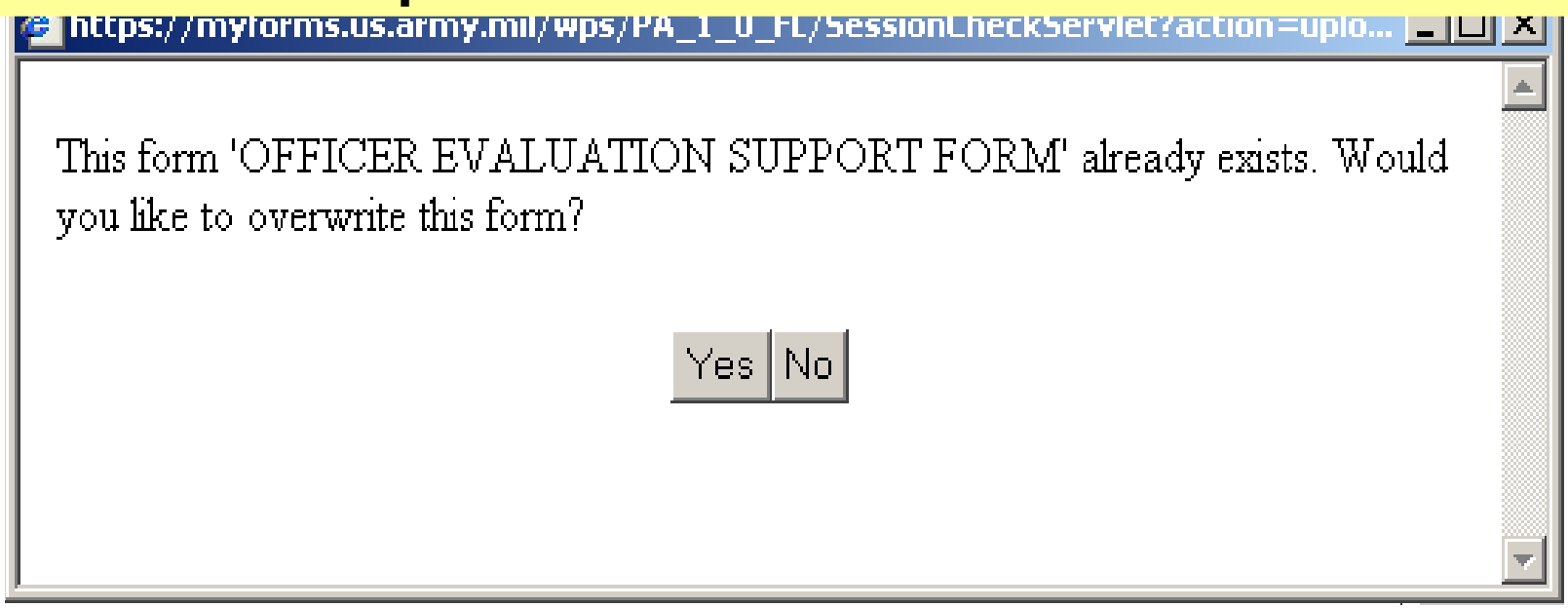
Select the CONTINUE button.

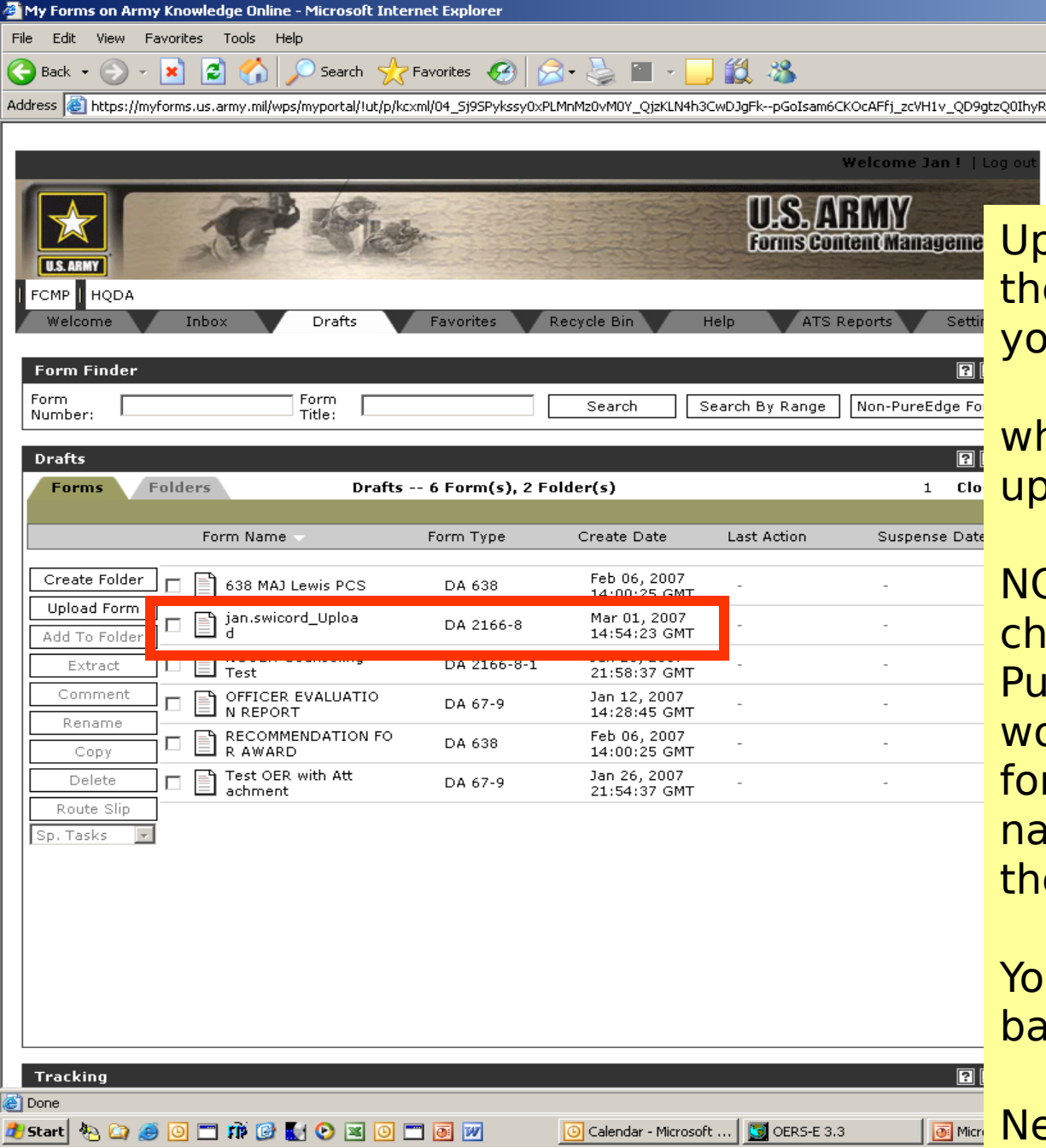


<u>Option 2</u>: **Alert: *"Would you like to create a copy?"***
You would get this alert if the form was in the My Forms system in the past and **another user has the original** in their My Forms workspace.
- The copy you have was probably saved locally (or "offline") at some point.
The system assigns an individual ID number to each form and remembers that ID when you attempt to upload the form.
- **To continue the uploading process, click YES. This will create a "My Forms copy" which will have a new ID that differentiates it from the original.**



<u>Option 3</u>: Alert: ***"Would you like to overwrite this form?"***
You would get this alert if **<u>you</u> have the "original" form** in your My Forms workspace.
- The copy you have was probably saved locally (or "offline") at some point.
Again, the system assigns an individual ID number to each form and remembers that ID when you attempt to upload the form.
- **CAUTION. If you click YES, you will overwrite the original in your My Forms workspace. If you don't want to overwrite the original, then follow the steps in the next slide . . .**


https://myforms.us.army.mil/wps/PA_1_0_FL/SessionCheckServlet?action=uplo...
This form 'OFFICER EVALUATION SUPPORT FORM' already exists. Would you like to overwrite this form?
Yes
No


My Forms on Army Knowledge Online - Microsoft Internet Explorer
Welcome Jan ! | Log out
U.S. ARMY
Forms Content Manageme
FCMP | HQDA
Welcome | Inbox | Drafts | Favorites | Recycle Bin | Help | ATS Reports
Form Finder
Form Number:
Form Title:
Search
Search By Range
Drafts
Forms | Folders
Drafts -- 6 Form(s), 2 Folder(s)
Form Name | Form Type | Create Date | Last Action | Suspense Date
Create Folder
Upload Form
Add To Folder
Extract
Comment
Rename
Copy
Delete
Route Slip
Sp. Tasks
638 MAJ Lewis PCS | DA 638 | Feb 06, 2007
jan.swicord_Upload | DA 2166-8 | Mar 01, 2007 14:54:23 GMT
Test | DA 2166-8-1 | 21:58:37 GMT
OFFICER EVALUATION REPORT | DA 67-9 | Jan 12, 2007 14:28:45 GMT
RECOMMENDATION FOR AWARD | DA 638 | Feb 06, 2007 14:00:25 GMT
Test OER with Attachment | DA 67-9 | Jan 26, 2007 21:54:37 GMT
Tracking
Done
Start
Calendar - Microsoft ...
OERS-E 3.3
9:45 AM

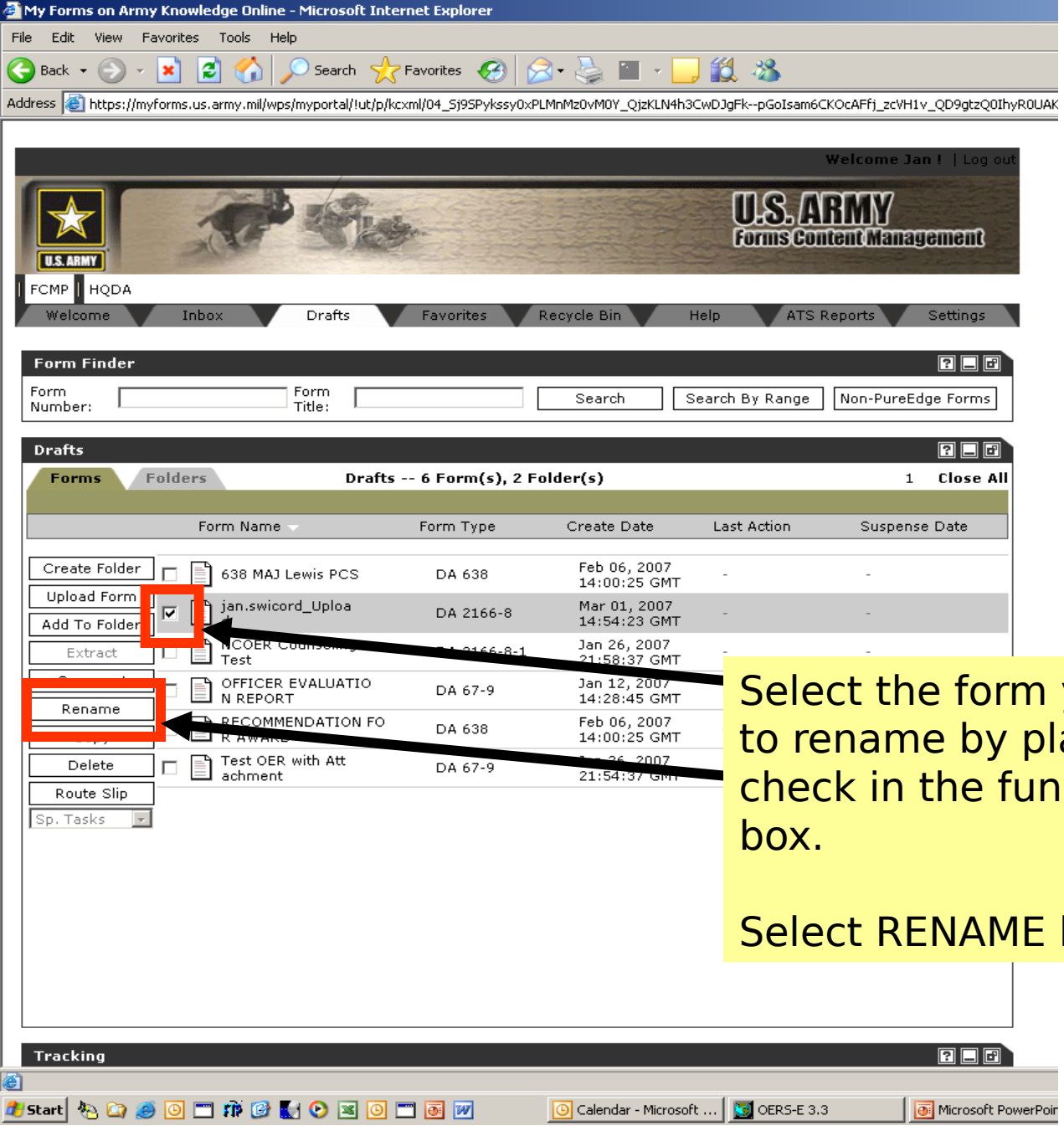
Upon successful upload, the computer will return you to the DRAFT tab

where you will see your uploaded form.

NOTE: The form name changes. Army Publishing Directorate is working to have uploaded forms retain the original name at upload. Until then...

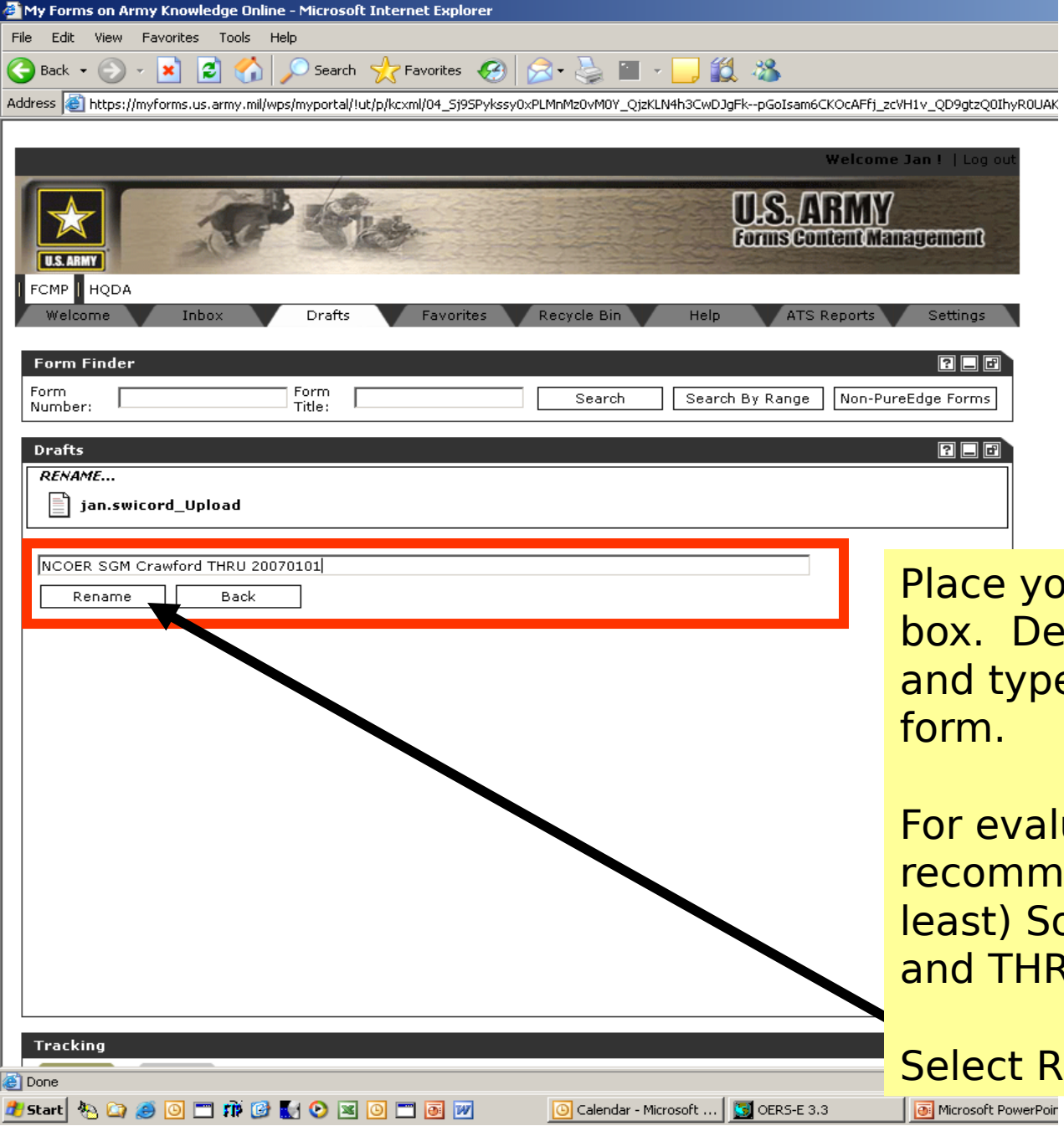
You can rename the form back to what it was.

Next slides show how to rename a form.



Select the form you want to rename by placing a check in the functions box.

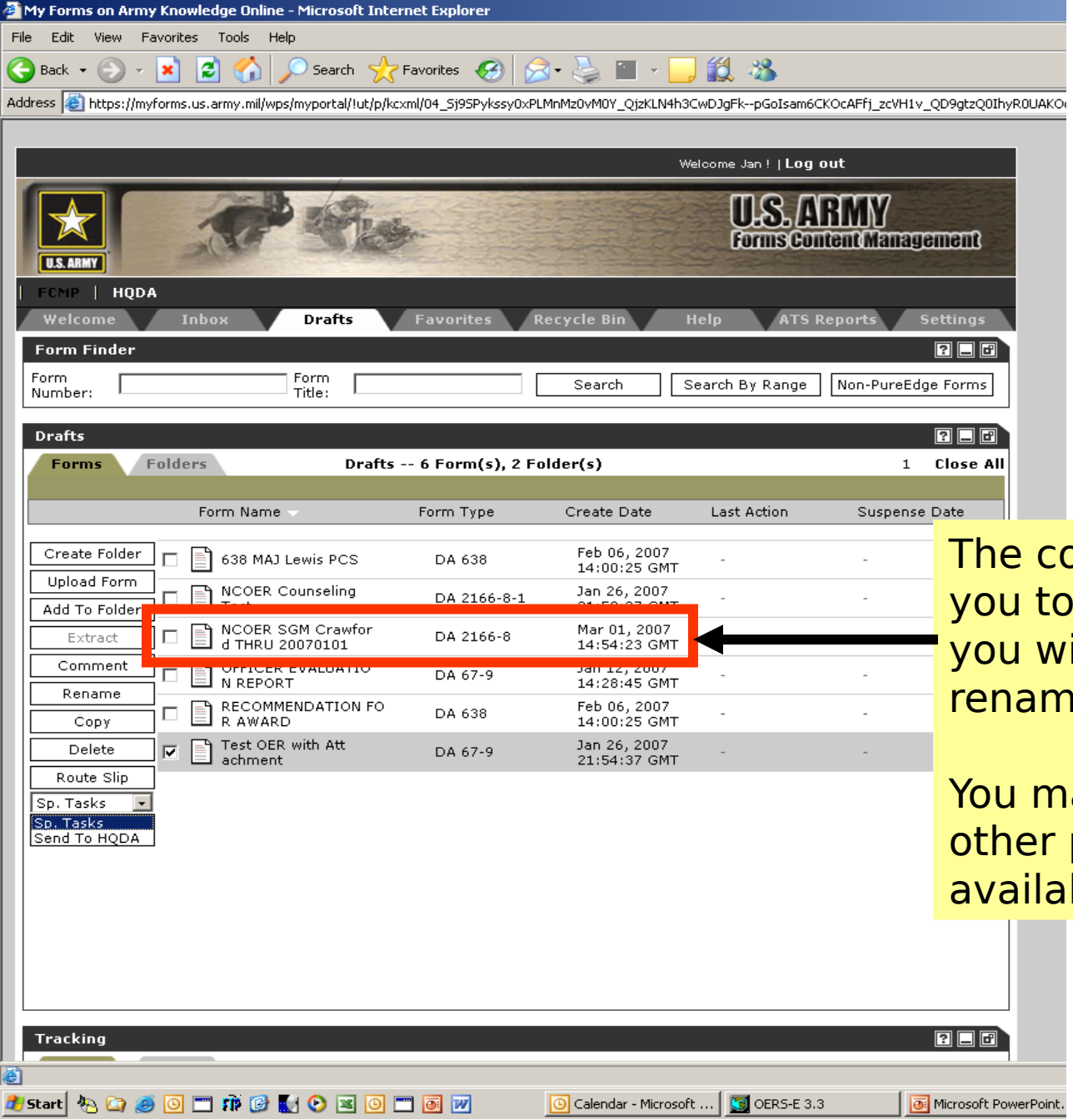
Select RENAME button.



Place your cursor in the text box. Delete what is there and type in the name for the form.

For evaluations we recommend displaying (at least) Soldier rank and name and THRU date for report.

Select RENAME when done.



The computer will return you to the Draft tab and you will see your renamed form.

You may now execute any other portal function available to forms.

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